

# Refresh Account Start Dates Immediately With This Custom Query



When working with your client's important data, it's critical that you have the ability to provide the most accurate picture of holdings, performance, and account history at any given moment. When updating client information, there are several processes in Orion's system that will automatically refresh overnight, but what if you want to see an update even sooner?

## What?

Occasionally, you may need to update a client's account start date. After entering your client's new information, the Orion system will refresh the account data overnight. Did you know you also have the option to push an update and refresh the data automatically? Using the "Account Start Update" query (7719) you can ensure your client's account is updated immediately.

## Why?

This query can be useful when you create or re-activate an account and you want to see that account's data appear on the same day in the Client Portal, Household Overview or on Reports. It can also be helpful if you create a related household in Manage Users but it's not showing up in the Client Portal.

## How?

Running this query will push an immediate refresh to an account's start date in the system. For example, if you un-cancel an account and that account doesn't

have a start date, you can use this query to populate the account start date.

To run the Account Start Update query, follow these four easy steps:

1. Launch the Query app.
2. Ensure "All Queries" is selected on the right-hand side.
3. Locate the "Account Start Update" query (7719) by using the search bar at the top of the query list.
4. Double click the Account Start Update query > select "Run."

Query ID	Title	Run For	Schedule Active	Category	Description
	account start				
18549	Account Start and End Date	Advisor		Audit Reports	Account Start and End Date
1359	Account Start Date	Advisor		CLIENTS	Accounts created date and the date of the first transaction
7088	Account Start Date Not Populated	Administrator		OAS	Report displays any ACTIVE accounts that have a transaction within the account bu...
7719	Account Start Date Update			Accounts	The Account Start Date on the account is updated to the accounts first transaction ...
				CLIENTS	Report that shows accounts beginning and ending values.
2786	Account Starting Value	Advisor		[All]	Account Starting Value
12740	Advisors Excel - Account Starting Value - Rep	Representative		[All]	Account Starting Value
20423	Bautis - Account Starting Value	Advisor		[All]	Bautis - Account Starting Value

Need additional help? Feel free to contact the Platform Support Team at [success@orionadvisor.com](mailto:success@orionadvisor.com).

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